



# **STUDY AWAY STANDARD OPERATING PROCEDURES**

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Administered by the Office of Study Away  
in support of faculty and staff teaching Study Away courses

Office of Study Away  
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## FOREWORD

WKU's Office of Study Away provides opportunities to extend the classroom beyond the campus borders in cooperation with faculty, their academic departments and colleges.

Faculty have been leading "study away" programs for years in various formats. The most familiar model may be the "field trip" in which a short (1 to 3 day) off-campus learning opportunity takes place within a regular course. Another format is sometimes called an "embedded field experience" with a multi-night (4+) off-campus component in which the majority of the course takes place on a WKU campus or online.

A formalized Study Away course is a credit-bearing course for which a substantial portion of the course includes travel to destinations in which a US citizen does not need a passport. With study away programs gaining in popularity, these guidelines outline how WKU employees, students, and the University as a whole operate Study Away programs.

Since faculty are not required to use the services offered by the Office of Study Away, these guidelines pertain only to programs developed through the Office of Study Away. Faculty and their departments are encouraged to call upon our administrative support services to enhance the learning opportunities of our students.

We look forward to working with program leaders on your Study Away program.



Jerry Barnaby  
Director  
Office of Study Away

## I. Guiding Principles

Successful Study Away programs are guided by these principles.

1. Courses should provide rich academic content and opportunities for personal growth, while also improving cultural awareness.
2. Planning, well in advance of a program start date, increases the likelihood of achieving the intended learning outcomes.
3. The chosen destination(s) must be central to the clearly defined learning outcomes.
4. Student safety requires attention in all phases of development and implementation.
5. Faculty should not handle individual student money.
6. Electronic processes ideally replace paper processes.
7. Study Away programs are a shared responsibility.

## II. Getting to know those involved with Study Away programs

The Study Away model enables faculty to focus on academic content and student recruitment, while support units invest the time, energy, and expertise administratively supporting your Study Away program. Faculty do what they are trained to do – provide outstanding academic experiences for students – while administrative specialists set up programs, manage budgets, and oversee risk management.

**The Office of Study Away** was established in May 2010 to support off-campus programs in locations in which students need no passport. The Office of Study Away provides collaborative administrative support, logistical oversight, budgeting, financial management, marketing with faculty leaders, their departments, and colleges. The Study Away staff work directly with program leaders and serves as a proxy them related to non-academic matters (see [www.wku.edu/studyaway](http://www.wku.edu/studyaway)).

**Program Leaders** are the faculty and staff who serve as the instructors and on-site administrators. They share in the development, implementation, post program reporting, and financial reconciliation of the program. To increase the likelihood of a successful program, program leaders are expected to share responsibilities and to participate actively in all phases of the program.

## III. Developing an Study Away Program

Program leaders work directly with Study Away staff to develop and manage their Study Away program.

### Characteristics of Study Away programs:

1. Program location(s) do NOT require a passport.
2. Offer at least one WKU credit course taught by a WKU employee.
3. Course(s) are set-up in Banner with specific characteristics that differentiate them from on-campus courses.
4. Customarily offered in WKU's winter term or summer session. However, program activities during either the fall or spring academic terms are possible and would be handled on a case-by-case basis.
5. Courses offered through third-party providers or consortia to which WKU belongs, even if led by WKU faculty, are outside the scope of the Study Away program.

### Program Leadership Team

The sharing of responsibilities and duties among the Program Leaders in coordination with your STUDY AWAY coordinator increases the likelihood of a successful program. While your STUDY AWAY coordinator help facilitate the process (described in other sections), the Program Leaders are encouraged to divide responsibilities. Program Leaders work directly with your STUDY AWAY coordinator to develop and manage their STUDY AWAY program.

Only one Program Leader is required, but many programs include two program leaders. Since the program fee paid by students funds all or a portion of each Program Leaders' expenses, each leader is expected to be engaged on all aspects of the program for the benefit of all the students. Programs are encouraged to maintain a participant-to-leader ratio of not more than 12:1. To determine the ratio, students enrolled in multiple courses will be counted once. If program leaders desire staffing beyond the recommended level, remuneration (if any) for additional personnel must be included in the program budget.

The program leadership team is expected to look after many aspects of the program while Study Away staff help facilitate the process (described in other sections). The sharing of responsibilities and duties between the program leader and Study Away staff increases the likelihood of a successful program.

Part-time faculty and full-time staff members can be very effective if they had proven experience in the location. Experience counts. The choice of second faculty leader (or assistant leader) is important since we need someone with better familiarity of WKU processes and is eligibility for Pcard, group travel voucher and such.

**Part-time Faculty** - PT faculty have been able to serve in this role, but the expectations is that at least one program leader will be a FT employee at the time of the program. The department needs to note if they expect the PT will be employed at WKU before and after the program dates (ex. spring and fall for a summer STUDY AWAY). If a program leader becomes ineligible due to employment status, replacement may be approved through a program amendment.

### **Faculty Leader**

A faculty leader is any WKU employee listed as the instructor of record within an STUDY AWAY program.

Faculty Leader Eligibility:

- Be in good standing regarding academic outcomes and closeout (financial and narrative report) of past STUDY AWAY programs,
- Meet academic department eligibility requirements to be the instructor of record,
- Be employed by WKU or by another educational organization with which WKU has a signed agreement, and
- Obtain the WKU Travel Authorization.

*Note: Sometime WKU faculty may partners with faculty from another school. The leadership team requirements may be reconsidered depend the specific situation, but must be approved by the CIO (or designee) at the proposal step.*

### **Assistant Leader**

Some program's include a second leader who not an instructor of record. If the person is not an instructor of record of a course within the program, he/she is listed as an assistant leader. The assistant leader may do a range of things one cannot predict in advance, but he/she is integral to the success of the program and is expected to participate in all aspects of the program leadership. It should be demonstrated in the proposal that the assistant leader is able to serve in his/her capacity before, during and after that program.

Assistant Leader Eligibility:

- Be in good standing regarding academic outcomes and closeout, (financial and narrative report) of past STUDY AWAY programs,
- Obtain the WKU Travel Authorization, and
- Meet one of these:
  - A WKU employee appropriate for the level of responsibility,
  - A graduate student with specific approval of the department head (or chair), who is not enrolled in a course within the STUDY AWAY program (Graduate students may earn credit in a course outside the STUDY AWAY program),
  - A representative of an organization with which WKU has an agreement that clearly states his/her role as an assistant leader, or
  - A local provider or partner with whom an STUDY AWAY program is coordinated.

*Note: Other assistant leaders may be considered due to specific needs or opportunities, but must be approved by the CIO (or designee) at the proposal step.*

### **Adding a Third Program Leader**

Sometimes program leaders wish to add the third leader who is currently a WKU employee. The person must meet all the eligibility requirements and must be budgeted appropriately. Sometimes program leaders wish to add a third leader who is not currently a WKU employee. This may be considered by provide evidence of the person's contribution to the program. Such contribution may be language skills for the country of the program or time lived in the country. The person may be hired into a part-time occasional

position at WKU in order to facilitate the operation of the program. Such hires must pass a background check and be hired through process established by WKU Human Resources. This option should be considered only after considering current WKU employees. The addition of such a person must be approved by the Department Head, Dean and the CIO. The person must be budgeted appropriately.

If the Assistant Leader is being compensated by another institution as part of the STUDY AWAY program, the AL is ineligible for WKU compensation, even if the AL is a WKU employee. A person may be compensated only one time for the same work period within the STUDY AWAY dates.

In the event a member of the Study Away staff serves as an approved program leader, another member of the Study Away staff will provide administrative support and conduct the financial oversight and closeout of the program.

### **Family Members Serving in Program Leadership**

Family members may have specific skills and/or experience that may benefit the program. However, non-WKU employee family members do represent a potential conflict of interest. Extra review is conducted if such a leadership team is proposed to ensure policies, regulation or laws are met.

### **Laying the Groundwork**

**Curriculum Development Phase** – A solid learning plan places a priority on the academic learning outcomes determined by the destination(s). The plan should address the goals of providing

- **meaningful academic content,**
- **opportunities for personal growth,** and
- **Improved cultural awareness.**

**Site Visit** - Familiarity with the program destination is essential. Matching grants are available through the Office of Study Away to support faculty professional development. A site visit rubric improves your assessment to make sure program leaders use your time effectively. Faculty leaders use the post-site visit report to develop the program (See [Resources section](#)).

### **Program Planning Meeting (#1)**

Program leaders are encouraged to meet with the Study Away staff before undertaking ANY program actions. All the important elements are reviewed at this meeting along with sharing ideas on how to create an effective learning environment for your students.

Tasks include, but are not limited to:

1. Program Planning Guide
2. Policies
3. Discuss learning goals and location
4. The next steps

**Developing the Program Plan** – A program plan enables program leaders to consider several elements not normally faced when teaching a classroom-based course and helps your program design process (see [www.wku.edu/studyaway/leaders/](http://www.wku.edu/studyaway/leaders/)).

## **IV. The Office of Study Away's role in the administration of the Program**

The Office of Study Away (SAO) is tasked with managing the budget and financial reporting, administering travel and logistical support, facilitating student course registration and billing, and providing marketing material for the program leaders. Study Away programs are a shared responsibility, and the Office of Study Away undertakes these tasks in active partnership with the program leader and in support of the academic goals of the program.

Faculty and academic departments benefit significantly from the Office of Study Away's administrative support.

<ul style="list-style-type: none"> <li>• Faculty focus on delivering the most effective learning experience possible.</li> <li>• Faculty find support in every phase of the program.</li> <li>• Faculty work with your Study Away staff member as the primary contact for the program.</li> <li>• Academic department staff do not need to take on the added responsibility of completing financial reconciliation of the programs.</li> <li>• Safety while away is monitored by several WKU units, providing program leaders layers of support when needed.</li> </ul>	<ul style="list-style-type: none"> <li>• SAO serves as the financial manager of the program budget and account, relieving program leaders from reconciling the financial close-out of the program on your own.</li> <li>• SAO tracks all expenses and revenue of the budget, relieving program leaders of the daily financial monitoring of the account.</li> <li>• SAO secures travel arrangements for the program participants as agreed with Program Leaders, relieving faculty of spending valuable time dealing with these details.</li> <li>• SAO staff works with departments to set up the course in Banner, then registering and billing the students.</li> <li>• SAO provides professional marketing services to help reach the target pool of students with the right message.</li> <li>• SAO maintains a working checklist for all program tasks that are references in the SOPs.</li> </ul>
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### Developing the Budget

Study Away staff will develop a program budget based on information provided by the program leaders. The goal is to help find the right balance between affordability, accessibility, and the program goals. Since the budget is based on student enrollment, a realistic number of participants is essential. The target number becomes the guide for all decisions related to financing the program.

The budget normally includes:

1. Airfare and ground transportation and on-site expenses of each participant (student/noncredit),
2. Airfare and ground transportation and on-site expenses of each program leader,
3. Compensation (plus fringe) and meals & incidental expenses for each program leader, and
4. Offsets from other sources (i.e. departmental support).

The budget would not include costs for non-WKU program leaders, except if defined in a signed agreement.

**Tuition Waiver** – Tuition waivers and discounts may not be used for Study Away programs.

**Budget Disasters.** Reasons abound for budgets ending in the red. Missed or underestimated expenses. Low enrollment. Adding expenses after program budget set. All lead to a deficit that ends up costing your department or college money to correct. Program leaders are encouraged to plan carefully and not assume that someone else is going to catch an expense program leaders did not anticipate. If this happens, your Study Away team and program leaders will need to review the situation and determine corrective action.

## V. Putting the Program proposal together

***The importance of starting the approval process early cannot be stressed enough.*** This ensures adequate time for marketing and recruitment and provides students maximum time to secure funding.

- **New Programs** – A new program proposal process should begin **at least 18 months prior to planned departure**, ideally following the schedule found <https://www.wku.edu/studyaway/leaders/>. This systematic approach will help alleviate a great deal of stress for everyone involved.
- **Repeating Programs** – Program leaders are encouraged to conduct the program multiple times, since Repeating programs enable faculty, department heads and students to plan ahead, thereby improving the chances of a successful program. A Repeating proposal would have an abbreviated implementation process and the proposal form is found at <http://www.wku.edu/studyaway/leaders/studyawayprogramproposal.php>.

- **Continuing Programs** – Departments may choose to commit to a long-term program that fulfills a specific degree requirement or fits into the *Colonnade* program. Such options enable students, faculty and departments to plan and build program interest. Such a program would be formalized via an agreement between the Office of Study Away and a department.

## VI. Moving through the approval process

The approval process enables faculty to create an affordable program with the highest academic standards. The process should begin as early as possible to allow time to develop, review, and prepare the program since travel logistics need to be completed in a timely manner. Additionally, sufficient time is needed to recruit students and allow them the time to secure funding.

The Office of Study Away's role is to develop a budget based upon your proposal and ensure your fully-signed proposal gets into the review/approval process.

**Study Away Approval Process** - the Office of Study Away determines and manages the review/approval process.

Study Away programs must be approved *in advance* by each relevant department head, college dean, and the Office of Study Away, in order for program leaders to receive compensation or travel reimbursement. All proposals will have specific deadlines determined by the Office of Study Away. A proposal received after the deadline would normally be deferred to the next academic year.

- **Proposal** – The proposal brings together all the pieces needed for full review.
- **Syllabus** – A Study Away course is held to the same academic standards as a campus-based course. Syllabi must include the same elements as a standard course along with those elements unique to a Study Away course. Accreditation requires attention to syllabus design. Relevant sections often overlooked in Study Away syllabi are found in Section II.B – Detailed Information of the Course Syllabus policy as stated in the proposal. Enforcement of these policies is expected at the department level.
- **Itinerary** – This is a preliminary day-by-day agenda with special emphasis on travel dates, activities, and destinations.
- **Short Biography** – This is a statement that verifies each program leader meets the eligibility requirements and demonstrates experience with Study Away teaching and explains each program leader's knowledge of the destination.
- **Approval of Department Head and Dean** – Due to the curricular and financial obligations of departments and colleges, approval from the department head and dean is required. Programs with cross-listed or multiple courses require approval from each department and college from which credit would be awarded. Comments from these individuals enable a more thorough assessment of the completed proposal.

### The approval process follows these steps.

1. Program leader prepares the proposal.
2. Study Away staff reviews with program leaders.
3. Department Head reviews, approves, provides comments, and financial support (as appropriate).\*
4. Dean reviews, approves, provides comments, and financial support (as appropriate).\*
5. The Office of Study Away develops preliminary budget from information provided by program leaders.
6. If approved, the Office of Study Away signs agreement with program leader.

*\* In the case that a program leader is also a department head, associate dean, dean, the Director of Study Away would review and approve in his/her place.*

After the proposal is approved, the Study Away team and program leaders implement the program beginning with a Kick-Off meeting.

## VII. Implementation

### Kickoff Meeting (#2)

After a new proposal is approved, the program leadership team meets with the Study Away staff for the Kickoff Meeting. During this session, we review the program and implement the marketing and recruitment plan.

Tasks include, but are not limited to:

1. Review program details (from proposal)
2. Implement the marketing and recruitment plan
3. Determine responsibilities
4. Review budget and agree to program fee
5. Agree on roster minimum
6. Agree on PL expenses to be included in budget
7. Agree on compensation
8. Agree on on-site administration dates/locations
9. Complete PL contact information/health inventory
10. Sign leader agreements

**Agreement** – the Office of Study Away and the program leaders sign agreements that define all commitments and obligations. The agreement will adhere to policies and procedures relevant to Study Away courses. Regular WKU staff members' compensation is addressed in the agreement since time/effort must be accounted for while away from their regular university position.

**Managing the Program Account (Index)** - the Office of Study Away will establish and manage the Study Away account index after a program is approved. Expenses may be applied to the program account only with an approved proposal on file with the Office of Study Away. While most program leaders track the expenses within the established budget, the Study Away Director serves as the financial manager of the account index.

**Amending an approved program** - Between the approval and departure, program leaders may wish to change aspects of the program. Program leaders need to inform the Office of Study Away as soon as the change is considered to facilitate securing appropriate approvals as needed.

Depending on the significance of the change, differing levels of review and re-approval may be needed. If the change would have been included in the original proposal (such as the addition of a graduate section or honors section), then the additional syllabus and acknowledgement from the department, dean, is required. If the change significantly affects students, syllabi and/or budget, then a new proposal would be needed.

All approvals must be completed prior to any funds being spent from the program account on behalf of the program.

**Repeating Programs** – When initially approved, the expectation exists that the program will be conducted multiple times. After the first approval, a program may be conducted three times before a full review/approval is needed again. For the second and third iteration, a Repeating confirmation would be submitted with an abbreviated review. Depending on the types of changes in a Repeating program, further documents may be needed. At a minimum, the confirmation would include an updated syllabus and itinerary. As with all Study Away programs, a department head and a college dean approval is required.

The **level of review** for amended and Repeating programs would be determined by the following.

- Program leader change (either faculty or assistant leader).
- Significant itinerary change that impacts syllabi and/or budget.
- Change of year and/or term.
- Changes that would affect program cost or logistics.
- Program at risk due to low enrollment and/or previous budget deficit.
- Non-adherence to policies, ineligibility of a program leader, or risks in the destination(s).
- Other concerns expressed by program leaders, department heads, deans, or the Office of Study Away.

**Courses** – Study Away courses are created in Banner with specific characteristics that differentiate them from on-campus courses. The Office of Study Away will provide the course information to departments, who will be responsible for entering the information into Banner. Study Away courses may be created in Banner ONLY if an approved proposal is on file with the Office of Study Away.

**Cancellation** - The University reserves the right to cancel a program. Any cancellation decision would be reviewed by the Office of Study Away with the program leaders and their academic departments.

## VIII. Recruitment Phase

The recruitment phase is loosely defined as the time between program approval and pre-departure. While much is completed during this phase, **recruiting students is a primary focus.**

During this phase, it is essential that all potential participants be fully informed of the program demands, requirements, and costs. Consistent information must be conveyed by all involved such as deadlines, course requirements and eligibility, health and safety information, level of strenuous activity and potential risks of required activities, and access to medical treatment. This information is most effectively stated in the syllabi and program documentation, and should be made available through multiple delivery methods.

**The Green Sheet** - A key document in this process is referred to as the “green sheet,” which is developed by the Study Away staff, and is posted on the Study Away web site. It serves as the “contract” between WKU and student regarding many aspects of the program including eligibility, billing, withdraw penalties, etc. Some programs require specific waivers and agreements, and the Green Sheet would complement and refer to these other required documents. Program leaders are the final determinant of student acceptance so all the application and approval documents must support each other. It is essential that your Study Away staff is informed about separate applications/requirements from the start and such documents should be included in the proposal.

Study abroad programs are more successful when everyone involved maintains open communication. This does require several meetings with the Study Away staff and program leaders as outlined in Implementation Timeline found at <https://www.wku.edu/studyaway/leaders/>

### Division of Responsibilities

#### Program Leaders –

- Actively recruit students through information/recruiting events and within your department(s).
- Review/approve marketing items, publicize the program to students with the goal of reaching the largest number of students eligible to participate in the program.
- Communicate with the Office of Study Away in a timely fashion before, during, and after program.
- Provide material for the website (i.e. images, narrative descriptions) in a timely manner.
- Accept (or reject) student applicants (all courses include “permission of instructor” eligibility requirement) and noncredit participants.
- Prepare/present course requirements, policies, and guidelines to potential participants.
- Communicate with students throughout the application and pre-departure process.

#### Study Away Staff –

- Administer the program account.
- Prepare green sheet.
- Create and maintain the web site and prepare marketing material.
- Support your recruitment efforts.
- Conduct preparedness review and providing support material.
- Set up student payment and registration process.
- Work with academic departments to set up course in Banner.
- Complete reservations and payments for accommodations, transportation, and services in coordination with program leaders.

### Recruiting students is key.

Programs tend to succeed when **each program leader recruits for the program.**

However, program leaders are not alone. Study Away creates marketing material in response to your marketing plans. To maximize efficiency, clear communication and coordination between Study Away and program leaders are critical.

**Marketing** – Marketing and recruitment efforts vary in cost that range from actual expenses to time/effort of the people involved. While innovative marketing efforts are encouraged, the costs must be reasonable and justifiable.

The Office of Study Away’s marketing team can provide cost estimates for these types of communication tools so program leaders will know how such efforts may impact your program budget.

### **Adding Students in Late**

Sometimes there is the opportunity to add late applicants to a programs. The expectation is that all students pay the same amount for program expenses and offering incentives for students have proven problematic on past programs.

The goal is to attract the largest number of eligible students to a program therefore multiple marketing strategies should be employed that may include:

- Printed material (e.g. advertising, post cards, posters, flyers, etc.),
- Live events (e.g. information sessions, recruitment fairs, classroom visits, etc.), and
- Electronic communication (e.g. email, listservs, campus monitors, social media, web sites, etc.).

### **Discounts to Students or Non-Credit participants**

Sometime a program will benefit when adding a person with skill set not already in the leadership team (i.e. language or knowledge of location). An incentive may be a discount to the program fee. If such a discount is to be offered, the program leaders must assure the following:

- All participants have the opportunity to be considered of the discount based upon a clear description of the expectations and demands in exchange for het discounts,
- a discount may be offered to graduate students who will earn course or internship credit outside of the courses offered in the program, and
- Immediate family members of any member of the program leadership team or those of Study Away staff are ineligible for any discount even if the person offers a particular skill or experience to the program. For purposes of Study Away, a family member is defined as a parent, child, grandparent, grandchild, sibling, spouse or domestic partner (as recognized by WKU HR).

### **Common Concerns for Students and Parents**

Every student approaches the decision differently, but common concerns include cost, deadlines, relevance of course to a degree plan, and paying for a program. Academic advisors and other offices on campus often help students deal with these concerns. However, program leaders remain an important contact for students and their families. Offering strategies for students to deal with these concerns goes a long way to filling and holding the roster. And of course, support is always available.

### **Participant Eligibility**

**Student Eligibility** - Program leaders may determine stricter eligibility requirements, but at a minimum, all applicants earning credit in a program would meet these requirements:

- Current WKU student eligible to enroll in WKU courses OR students from outside WKU may participate as visiting student,
- Good academic standing as defined in the Undergraduate Catalog or Graduate Catalog,
- A minimum of 16\* years of age at time of departure (parental/legal guardian expressed, written consent required for those under 18 at time of departure),
- No active current conduct record as verified by the Office of Student Conduct,
- Complete Study Away application and pay deposit,
- Complete pre-departure program,
- Full payment prior to departure, and
- Permission of instructor.

\* **Minors** – Applicants younger than 18 at time of departure must be registered in a WKU course for credit, must be a part of an established WKU program, and no guarantee of acceptance due to different program design and location.

if a student completes a program without full payment, the student should receive an incomplete until the obligation is paid. The Office of Study Away will inform faculty leaders if a student is in this situation prior to the Study Away term grade deadline.

**Visiting Students** – A student from an institution other than WKU must be admitted to WKU as a non-degree-seeking student (available online) and obtain a WKU ID number through the Office of Admissions before consideration for acceptance. Program leaders may choose to request evaluation material from visiting students.

**Student Disabilities Act** - The American Disabilities Act applies, and program leaders should advise students enrolled with WKU with the Student Accessibility Resource Center (SARC) officials prior to applying for a program.

## Inclusion of non-students

### Non-credit Participants

A non-credit participant may register for a program only if all program leaders agree to his/her inclusion and the person meets the relevant (non-student) eligibility requirements listed below. The Office of Study Away will provide a separate application/payment process. Similar to a student auditing a course, these participants are expected to be included in all program communication, processes, and activities prior to, during, and after the program. These individuals count toward the compensation calculation only if their program cost includes this expense.

Non-credit participants are not considered official program leaders, even if employed by WKU, and may have no program responsibilities or any expenses paid by the other participants. If a WKU student elects to be a non-credit participant, FERPA remains in effect. There are programs in which noncredit groups travel with the Study Away (e.g. WKU Alumni Association), and the requirements and connections to the Study Away will be determined on a case-by-case basis.

Program leaders may determine other non-credit participant eligibility requirements, but at a minimum, all non-credit participants shall meet these requirements:

- No current conduct record as verified by the Office of Student Conduct (if WKU student participating for noncredit),
- Complete application and pay deposit,
- Completion of pre-departure program,
- Full payment prior to departure, and
- Permission of program leaders.

If a non-credit participant begins a program without full payment, the participant should be dismissed from the program (see Dismissal section below). The Office of Study Away will inform faculty leaders if a participant is in this situation.

### Family Members

Family members may be included as non-credit participants through the same process described above. A family member's program fee is not calculated into the leader remuneration package, which includes both compensation and the expenses for the leader to whom the family member is related. For purposes of Study Away, a family member is defined as a parent, child, grandparent, grandchild, sibling, spouse or domestic partner (as recognized by WKU HR).

Current WKU students who are also the legal dependent of a program leader may participate either as a family member or a student earning credit and pay the appropriate program fee for their status.

**Minors.** Often, program leaders and students wish to take a child on a program. While this is a great opportunity, a minor on a program does represent significant burden to other program participants and could become a major (and natural) distraction to the parent. A person under sixteen (16) years of age may be included as a non-credit participant **only** if she/he meets the eligibility requirements stated above.

An individual currently enrolled in an accredited higher education institution (other than WKU), who is a dependent of a program leader, may participate as a non-credit participant at the sole discretion of the Director of Study Away.

All non-credit participants will be listed on the program roster and must provide documents when requested. In these guidelines, collectively, students and non-credit participants may be referred to as program "participants."

## Student Application Process

All for-credit participants must complete the Study Away application and pay the program deposit prior to being considered for acceptance.

Study Away is the primary contact for students regarding the application and payments. The application process is completed via TopNet, while the web site (and green sheet) are the primary sources of information. If there are other items needed to apply for a program, program leaders should work with Study Away staff to ensure the participants are informed of the requirements and have a mechanism to complete the items. Study Away will maintain student application materials so program leaders do not need to replicate this step. Program leaders may choose to keep a roster with information, but the application system will collect all the material required of each student.

Non-credit participants' information will not be collected in the TopNet application system at this time. Program leaders and Study Away will provide a registration process and maintain this information separately.

## Money Matters

**Deposit** – Recruitment is more effective when a clear deadline for an early deposit is communicated to all prospective participants. The standard process is for each participant to pay a non-refundable deposit by a specific deadline. The deposit is usually paid as a step in the application and holds the spot for the participant. Currently, students pay their deposit via TOPNET with a credit/debit card so that a student must take a proactive step to pay for the program. Although non-refundable, the deposit does apply toward the program fee.

**Invoicing the Program Fee** – The Office of Study Away will invoice each student's TOPNET account for the balance of the program fee (less the deposit). The billing information is listed on the program details (referred to as "Green Sheet"). Non-credit participants normally follow the payment schedule listed on their registration form.

**Scholarships** – Scholarship information is found on the Study Away web site.

## IX. Retention Phase

The Retention Phase is loosely defined as the three months prior to departure during which program leaders are encouraged to maintain contact with students who've applied and build excitement about course.

### Roster Minimums

The program budget is based on a minimum number of participants (credit and full-paying non-credit) stated on the leader agreement. Minimum enrollment requirements may be set by academic departments, colleges or the Office of Study Away. To track the roster, the Study Away staff follows this schedule:

**Check in – 10-week:** If the minimum enrollment is not achieved by seventy-days (70) days prior to departure, Study Away staff will work with program leaders to determine an appropriate course of action. This is due in part to commitment on airline tickets and other on-site group expenses.

**Check in – 5-week:** If the minimum is not met thirty-five (35) days prior to departure, Study Away staff will work with program leaders to determine an appropriate course of action.

**Check in – 3-week:** If the minimum is not met twenty-one (21) days prior to departure, Study Away staff will work with program leaders to determine an appropriate course of action.

At any check-in, the program may be cancelled and registered students provided other options or a refund.

## X. Pre-Departure Phase

This phase is loosely defined as the final eight-weeks prior to departure during which final preparations are to be completed in coordination with the Office of Study Away.

**This proves a hectic time for everyone.** Last minute changes, requests, and expenses represent a major negative impact on programs. Effective program leaders keep up with program details and respond in a timely fashion to information requests. The program leaders and participants must maintain eligibility to remain on the program.

We understand that faculty leaders juggle many responsibilities and Study Away details can get lost in the shuffle. Leading a program does require an organized approach by the leadership team in order for your Study Away staff to provide the level of administrative support require for each program.

### Division of Responsibilities

#### Program Leaders –

- Conduct a program-specific orientation.
- Become familiar with Student Handbook.
- Complete WKU pre-travel forms and purchasing card application.
- Complete preparedness training.
- Complete the Emergency Action Plan.

#### Study Away Staff –

- Monitor student payments.
- Register students for courses.
- Finalize accommodations and transportation in cooperation with the program leaders.
- Confirm Pcard with program leaders and record keeper.
- Review Emergency Action Plan with program leaders.

**Cancellation or Postponement** – As stated, the university reserves the right to cancel a program. Reasons may include low enrollment, non-adherence to policies, and ineligibility of a program leader.

- **Low Enrollment must be addressed as early as possible.** The budget is based on a minimum number of students and full-paying noncredit participants. If the roster falls below the agreed to minimum, the program may have to be cancelled. Study Away staff and program leaders determine together if the program should be cancelled or postponed to the next year. It is the program leader's responsibility to inform the Study Away staff and the students already in the program when cancellation is official. This exact date is important due to scholarship awards and refund implications for students.
- **Program leaders may decide to postpone a program to the next appropriate term.** As with the amendment process, the number of changes to a postponed program affects the level of re-approval needed. In most cases, an email to the Study Away Director initiates the postponement process.

### Red Book Meeting (#3)

Within twenty-one (21) days of departure, a final pre-departure meeting with the program leadership team and the Study Away staff is the time to check all final matters. The Red Book is the program leadership team material prepared by the Study Away staff.

Tasks include, but not limited to:

1. Red Book review
2. Confirm w/Leader Completion of Travel Authorization
3. Disburse Program Leader Procard
4. Set Closeout meeting date
5. Review roster information (passports and emergency contact info)

### Money Matters

While planning ahead is essential, a program must be approved before funds can be spent or committed by the Office of Study Away. Sometimes deposits may be needed to hold accommodations or flights, and if there is such a need for funds prior to approval, a department or college would be responsible for expenses prior to program approval. If the program is approved, the pre-paid expenses are transferred to the program account. Again, the earlier a program is approved, the better chance program funds would

be available for early deposits. Repeating and continuing programs have more flexibility since the program account is already be established.

### Purchasing card

For financial accountability, one purchasing card (pcard) per program is attached the program account. Since the card holder is responsible for the use of the card, the proposed cardholder must apply for the card. The Office of Study Away staff is the designated as the record keeper. Good accounting practices improve record keeping, which ensure student money is used appropriately.

**Pcards may not be used for ATM access inside the United States.**

WKU's purchasing office manages the pcards and has these guidelines:

1. Pcards are open for approved program expenses within one week before departure.
2. If a program leaders does wish to make budgeted purchases prior to departure, he/she sends that request to the Study Away Coordinator so the request can be verified within the budget. If approved, Study Away will inform purchasing to open the pcard for a limited amount of time.
3. If a program leader requests to use the pcard for an item that would open the card to buy items beyond those in the program budget, a justification to adjust budget accordingly is needed.

While we discourage non-Study Away pcards, individuals with a pcard for another purpose may use that card (with prior review by SAO), but the cardholder is responsible for all expenses being appropriately processed and receipts are provided to SAO.

The key point is that the pcard is tied to the program budget, which is funded by student payments. It is to be used ONLY for direct program expenses that are in the program budget (the budget can be amended to accommodate changes that support the program and the courses). While cardholders may feel they are making it easier, opening the pcard for an extended window to time exposes the individual and WKU to financial risks.

### Group Travel Advance

A group travel advance enables program leaders to have cash on hand when program leaders arrive on-site, which is recommended for small and/or unforeseen immediate travel expenses. The group travel advance will be created by Study Away staff and requires your signature. Like the pcard, these funds are the recipient's responsibility and use of funds must adhere to reporting and closeout requirements of WKU.

### **Please don't wait until the last minute.**

Both the pcard and group travel advance must be requested well in advance of the travel dates. In past years, program leaders did not request either in a timely manner and ended up leading the program without the funds. This may result in significant out-of-pocket expenses for the program leaders that would need to be reconciled after the program. This could result in delayed compensation and reimbursement for the individual.

### Remuneration

The remuneration package includes approved program-required travel expenses and compensation.

- **Travel Authorization** – Study Away programs follow the policy established for travel authorization. Each program leader is responsible for pre-travel authorization regardless of whether WKU reimbursement is involved (see [WKU Faculty Handbook](#) - current edition; section Q.2, p15). Program leaders are responsible for securing approval and providing a copy to your Study Away staff. Neither a pcard nor a group travel advance can be requested until this authorization is received by Study Away. This process enables WKU to account for your location in case of an emergency.

The Employee Travel Authorization process and form is found at <http://www.wku.edu/studyaway/leaders/studyawayprogramproposal.php>.

- **Expenses** - Your travel expenses must be listed in the program budget and will be either pre-paid, paid on-site, or reimbursed on a travel voucher (group or individual). Only expenses accounted for in the budget are eligible for reimbursement.
- **Compensation** - Eligibility for compensation is determined by the department/unit head based upon individual employment status/agreement. Program leader compensation is calculated in the final program budget and listed in the Agreement. Study

Away programs follow the same compensations policy as Faculty-Led Study Abroad programs (Compensation Policy #1.2150) found at [www.wku.edu/policies/aa\\_policies/Study\\_Away\\_compensation\\_1\\_2150.pdf](http://www.wku.edu/policies/aa_policies/Study_Away_compensation_1_2150.pdf).

### **Student Conduct**

This this phase, WKU also does a check on Student Conduct records since an active record may prevent a student from participating in a study abroad program. The conduct check also include Title IX review. Student found to be ineligible due to conduct will be counseled by the Office of Student conduct to determine a process to remain in a program if that is possible.

### **Program Leader Conduct**

A program leader must remain in good standing as well based upon the code of conduct and others policies under which the person is reviewed. All employees are held the Title IX requirements.

### **Preparing yourself for on-site responsibilities**

As stated in the Guiding Principles, student safety requires attention in all phases of development and implementation. While no one can anticipate all possibilities, it is imperative to prepare for contingencies through a coordinated process that involves the program leaders, the students, and several units within WKU.

A formal training program is under development that will benefit from program leader input and mentoring. Ultimately, each program leader will complete a preparedness-training program to remain eligible to lead a program.

### **Emergency Action Plan (EAP)**

As stated in the Guiding Principles, student safety while abroad requires preparation in all phases of development and implementation. While no one can anticipate all possibilities, preparation involves the Program Leaders, the students, and several units within WKU.

The EAP enables effective risk management by addressing three important aspects: reasonable action, foreseeable outcomes, and the expectations students and their families have of the sponsoring institution. The EAP document is the means of dealing with situations that may arise during a program and is most effective when created and implemented by the Program Leaders.

Program Leaders represent WKU while on-site; therefore actively preparing a plan to deal with crisis situations improves our collective response to an emergency. The Emergency Action Plan (EAP) is developed jointly by the Program Leaders. It is the first element of preparedness. Through the development of the EAP, Program Leaders increase their ability to respond to an emergency. Study Away offers sessions in which program leaders create your EAP. Support material is also found in the [Resources](#) section below.

An EAP is often effective when incorporated into course learning goals as stated in your syllabus.

### **WKU Student Handbook**

Just as students are protected by and held to the standards stated in the WKU Student Handbook while on the WKU campus, they are also held to those same standards while abroad. For students, violations are just cause for dismissal from a program. Due to the unique nature of study abroad, Program Leaders are more effective when familiar with the [WKU Code of Student Conduct](#).

### **FERPA and Communication with Parents/Guardians**

Program Leaders should make themselves aware of the Family Educational Rights and Privacy Act (FERPA). While certain academic and personal protections exist within the FERPA guidelines, the Program Leaders may exercise discretion on reporting matters to WKU of a participant's emergency contact. The basic definition is that if a *student creates a situation that puts an individual student or the people around the student at risk*, then FERPA does not apply. If the matter is an academic issue, where there is no physical risk, then FERPA does apply. For details, see this link [http://www.wku.edu/registrar/ferpa\\_faculty.php](http://www.wku.edu/registrar/ferpa_faculty.php).

### **On-Site Essentials**

## Communication

### While students and their families often want a safety guarantee, we must all remember the following:

- WKU cannot guarantee or assure the safety of participants or eliminate all risks from the study abroad environments.
- WKU cannot monitor or control all of the daily personal decisions, choices, and activities of participants.
- WKU cannot prevent participants from engaging in illegal, dangerous, or unwise activities.
- WKU cannot ensure that U.S. standards of due process apply in overseas legal proceedings, nor does WKU provide or pay for legal representation for participants.
- WKU cannot assume responsibility for the actions of persons not employed or otherwise engaged by the program sponsor, for events that are not part of the program, or for situations that are beyond the control of the sponsor and its subcontractors.
- WKU is not responsible for situations that may arise due to the failure of a participant to disclose pertinent information.
- WKU cannot ensure that the cultural values and norms of the United States will apply in the host country.

Program Leaders often find it effective to include this information in the syllabus and discuss with students within the pre-departure process.

## Program-Specific Orientations

On-site success starts with a comprehensive Program Leader-led orientation that consists of one or more sessions with all program participants prior to departure. The orientation is an excellent venue to deliver essential information. Faculty leaders also find it effective to include this information in the course syllabi. The key topics covered will be required for all program participants. Leaders find it effective to state in the syllabi that failure to participate in the orientation program will result in the participant's dismissal from the program. A negative factor in any program is dealing with that one person who failed to participate in the pre-departure program.

A program-specific pre-departure orientation is required and these items are most effectively addressed as a learning goal in your syllabus (sometimes even an assignment) and discussed in your pre-departure process. A separate Program Leader Orientation Manual details the requirement for both a pre-departure orientation and on-site orientations.

The Program Leaders are expected to inform students about the behavior and university sanctions regarding misconduct. Program Leaders may implement stricter requirements, but all participants must acknowledge they have been informed of the requirements. Including this in your pre-departure program and syllabi tends to improve effectiveness.

## Important Considerations

**Emergency Card** –Some program leaders opt to obtain a card from the WKU ID center with the on-site contact information included. This provides each student a picture ID and a link to the program leaders' on-site mobile number and the campus emergency contact. Such a card would need to be included in the program budget.

**Medical Insurance** – Current medical insurance is required for each participant and is not included in the program fee. WKU employees are covered by our insurance.

**On-site Ground Transportation** – Group transportation is always an important consideration when moving a large group around a new place. The program leaders and Study Away staff should determine the options together while keeping in mind budget, convenience, and safety.

**Personal Vehicles** - WKU representatives who transport students in a personal vehicle in connection with the Study Away program are not covered by WKU's Certificate of Liability. A student who elects to drive a personal vehicle for program-related activities shall release WKU and its representatives from any liability prior the program-start date.

**Rental Vehicles** - Vehicles that are owned, leased, or rented for purposes of official WKU business may be used for a program. The PL is allowed to drive the program participants him/herself. However, the PL is advised to review WKU's Risk Management Policies and obtain the WKU Certificate of Liability found in the [Resource Section](#). Other drivers who meet eligibility requirements are allowed to drive a university rental vehicle (i.e. student participants).

## Handling Student Withdrawals

**Withdrawals** – The student must inform Study Away directly and in writing (email accepted) if he or she chooses to withdraw from a program. No other statements of withdrawal will be considered as notification of withdrawal, therefore, the student will still be considered a program participant until this written notification is received. Program leaders are asked to direct students wishing to withdrawal to the Study Away web site at [www.wku.edu/studyaway/student/study-away-withdrawal-request.php](http://www.wku.edu/studyaway/student/study-away-withdrawal-request.php). Penalties will be based on the notification date as listed in the Terms and Conditions section of the program details (Green Sheet).

These processes are reviewed regularly and updated as needed.

## XI. On-site management during the program

Program leaders are the on-site WKU representatives. Open communication between the Office of Study Away and program leaders is essential to promote a safe and effective learning environment. Study Away will provide emergency response and maintain student records and travel documents in case of emergency during the program.

### Division of Responsibilities

#### Program leaders

- Maintain accurate travel records (e.g. receipts, communications, and agreements).
- Manage program funds in a responsible manner/
- Locate closest medical services and how to access them quickly.
- Document and report health and/or safety incidents.
- Confirm group arrival with the Office of Study Away staff as soon as possible.
- Update on-site contact information and share with program participants.

Your Study Away staff remains available regarding financial matters for which program leaders may need assistance during the onsite phase.

**General Supervision of Students** – Program leaders are expected to supervise and direct students’ academic content, opportunities for personal growth, improvement cultural awareness, and behavioral expectations of the program for both pre- and post-departure. Program leaders are the primary person responsible for the supervision and welfare of the students participating in the program and are, among other things, responsible for supervising and monitoring each student’s conformance to WKU’s and other applicable policies, rules, regulations and standards of conduct.

**Handling Money** - Program leaders are expected to fulfill the fiduciary responsibility as the WKU representatives. The program is funded directly from student fees and all expenses must be directly related to program activities for all participants. Programs are more successful and sustainable when accurate records during the program. This includes tracking expenses, securing money and pcards, and keeping all receipts. All financial documents are required for the financial closeout.

**Incident Reporting** – SAO manages an incident reporting process that guides the response by WKU for a situation that may need official action. Your first call is to the Study Away Emergency Number, which triggers the response process. However, sometimes leaders wish only to confirm they’ve handled a situation correctly or need guidance on a matter that falls below a true emergency. While the Study Away team is available for consultation. Using good judgment, based on your own preparation and EAP, is the best course. If program leaders deem calling your Study Away staff is the best option, don’t hesitate to make the call.

**On-Site Emergency Medical Response** - The location of on-site emergency medical care and the relevant methods of transportation to each location are most useful when determined in advance or upon arrival. These should be communicated to participants and the Study Away contact. Program leaders are encouraged to familiarize yourselves in advance with the available medical services should they be needed quickly.

All participants are expected to use good judgment if faced with a situation that requires immediate attention by the program leaders. This could be established as a learning goal with a measurable assignment designed to prevent misuse of emergency services in the event of a true emergency. Getting lost is not an emergency though some students may think it is.

While not all situations can possibly be determined beforehand, these situations need to be addressed:

- If a student or noncredit participant is unable to be with the group for medical reasons, the program leader should assure the participant is under supervised, professional on-site medical care until a family member or a WKU representative arrives.
- If a minor is in need of medical care, the adult responsible for the minor is responsible for care.

### **When in doubt, call: 502-536-8782**

Program leaders use the communication protocol for issues that require WKU attention. The same protocol is utilized for program leaders to communicate with a student's family, should the situation require it.

**On-site Orientation** – An initial on-site orientation helps program leaders familiarize the group on the new location. It is often effective to have participants complete emergency preparedness documents and practice the emergency response plan as part of the on-site orientation. These exercises assist in communicating the EAP to the group and the different actions they should consider taking, depending on the incident such as accidental injuries, natural disasters, terrorist acts, or political unrest. An on-site orientation does not replace the pre-departure orientation, but may complement the process.

**Independent Travel** - Independent travel is a great way for students to explore their new surroundings outside of the program structure and provides personal growth and cultural awareness opportunities. Independent travel includes travel before the official start date, after the official end date, or within the program dates.

- **Outside Program Dates** - Independent travel outside the program start and ends dates does not need approval, although students must be clearly informed as to the start and end date, time and location, so they can plan their travel accordingly.
- **Within the Program Dates** - Program participants may undertake independent travel with program leader approval. Participants must understand the risks and personal liability, accept responsibility for their own safety, health, legal aspects, and costs associated with independent travel. They should be made aware of the option to obtain personal liability coverage at their own expense. Encouraging thoughtful independence goes a long way. It is helpful for students to inform the program leaders of independent travel plans early in the process. The program leader retains the right to deny independent travel within the program dates (and preferably in writing) if he or she deems independent travel too risky or disruptive to the course activities.

## **XII. Conduct while on-site**

It is important that program leaders communicate and enforce the expected conduct of WKU students and other participants as stated in the student handbook.

**Faculty/Staff Code of Conduct** - All WKU employees are held to the conduct stated in the Faculty Handbook. The current edition is found at this link: [http://www.wku.edu/academicaffairs/documents/wku\\_faculty\\_handbook\\_19th\\_ed.pdf](http://www.wku.edu/academicaffairs/documents/wku_faculty_handbook_19th_ed.pdf).

**WKU Code of Student Conduct** - WKU does not act as a policing authority for the activities of a student off university property, nor does it serve as a sentencing authority for a student's violation of national or local laws. However, the university may take appropriate action in situations involving misconduct that violates the WKU Code of Student Conduct. Certain actions or incidences, such as gross violation of elementary standards of behavior, may call into question a student's continued membership in the educational community. Additionally, his or her continued membership may be questioned if his or her presence would adversely affect the pursuit of educational goals set by others.

The program leader and Study Away staff should consistently inform students that the [WKU Code of Student Conduct](#) is enforced to protect each student and uphold the standards in the same manner as if the student were on a WKU campus. Violation of WKU regulations or policies may result in disciplinary action before and upon return to campus. Program leaders should familiarize themselves with this handbook to effectively communicate expected behavior.

**Non-Credit Participants** – Non-credit participant are not required to meet specific university-wide requirements, but are normally expected to meet the conduct standards stated in the Student Handbook. If program leaders are concerned about dealing with non-credit participants, they may either exclude such participants or develop expectations for these participants that could be part of an application or acceptance packet.

**Addressing Behavioral Problems and Disciplinary Action** - The SA procedures indicate the expected role for WKU employees while on-site for addressing behavioral problems and disciplinary action.

For consistency of enforcement, the leadership team will set clear guidelines regarding disciplinary criteria, behavioral expectations, sanctioning processes, and dismissal criteria and procedures. These will be communicated clearly to all participants prior to departure. The syllabus is an effective means to present this information.

## Disciplinary Process

**Conduct Review Process** - In the event the program leaders learns of alleged misconduct, the leader shall endeavor to speak with all available witnesses, including the alleged offender. For a case in which the program leader is alleged misconduct, the Director of Study Away shall designate an investigator. Program leaders will be provided Conduct Guide that details the process and responsibilities while the program is in-site. In the extreme event that a participant (student, non-credit, or a program leader) must be dismissed from a program, follow the communication protocol to consult with campus units.

**Illegal Drugs** - Violation of WKU's zero-tolerance illegal drug policy by anyone participating in or traveling with a WKU Study Away program is just cause for immediate dismissal from a program and needs to be clearly documented.

**Abusing the Alcohol Use Privilege** – Abusing the privilege is just cause for dismissal with proper documentation

**Dismissal** - In the event that a participant or program leader is required to leave the program because of his/her behavior or other reasons that pose an immediate risk of harm to anyone, the individual assumes the full cost of early departure and return to the program site. No program costs will be refunded.

If student is dismissed from a program, the Study Away Director must be informed immediately. If a minor is dismissed from a program, then the adult responsible for the minor must also leave the program. For a case in which a program leader is dismissed from a program, the Study Away Director shall designate a temporary program leader.

## XIII. Post-Program Phase

The post-program phase includes the close out the financial records and assessment of the program. It must be completed in order to account for all funds spent on the program and to determine ways to improve the program should it be conducted again.

The closeout runs best when the recordkeeping during the preceding phases is done correctly and consistently.

### Program Leaders –

- Participate in the post-program financial reconciliation,
- Provide a post-program assessment/report to Study Away,
- Meet with Study Away staff for a debriefing session to assess the program and determine the next steps, and
- Prepare a Repeating proposal for the next iteration.

### the Office of Study Away/Study Away:

- Complete financial close out of program budget,
- Create post program communication (i.e. press release),
- Conduct general assessment, and
- Prepare final report.

## Close Out Meeting (#4)

Within ten (10) business days of the program end date, the program leadership team meets with the Study Away staff to close out the program.

Tasks include, but are not limited to:

1. Collect Program Leader Procard
2. Leader return unused cash by check to Accounts Payable
3. Collect receipts for Closeout
  - a. Procard Receipts to Record-Keeper

- b. Cash Receipts to Group Travel Voucher
  - c. Recalculate MIE from and leaders sign
  - d. Confirm Program Leader Post-Assessment is Completed
4. Complete Group Travel Voucher (Travel Voucher Form; Signed MI&E; Receipts; Roster; Itinerary)
  5. Collect balance of cash advance if determined by Accounts Payable/Travel Office (if leader owes money back)

## Money Matters

- **Travel Voucher** – For reimbursements to be paid on an individual [travel voucher](#), program leaders may complete your own voucher or designate a the Office of Study Away staff member as a Proxy on the electronic travel voucher to facilitate the reimbursement process and to ensure the amounts are accurate and in line with the program budget.
- **Group Travel Voucher** – For reimbursements to be paid on a group travel voucher, the program leaders must provide all documentation in an appropriate manner to Study Away staff, which will reconcile the expenses and create the voucher for reimbursement.
- **Excess funds** – Funds provided on the group travel advance must be returned within ten (10) business days of your program end date. The funds are accepted as a check in your name for the exact amount. Cash will not be accepted.
- **Purchasing Card** – All pcard receipts are to be returned in an appropriate manner to Study Away staff, who will reconcile the program budget.
- **Financial Reporting** – The final balance of each program will be reported to the relevant department heads, college deans, the Office of Study Away, and the Provost. The financial history of a program will be taken into account when considering the program in subsequent years.
- **Post-Program Fund Balance** - Post-program surpluses and deficits will be distributed and corrected, respectively, by a formula agreed to between the college deans and the Provost.

Receipts need special attention since they are the primary record of financial transactions.

The Office of Study Away provides an information sheet on proper handling of receipts.

**Post-program assessment** - Your closeout report is due to the Office of Study Away by the date determined in the Program Leader Agreement. Program leaders submit final post-program assessment in order to receive compensation. The structure of the assessment will be provided by the Office of Study Away. .

## XIV. Compliance

These administrative guidelines are based upon several policies such as the WKU Student Handbook and the WKU Faculty Handbook. HR policies, purchasing guidelines, travel guidelines; workers compensation and liability statutes for employees of the Commonwealth of Kentucky are referenced in this guidelines as well.

Unless otherwise noted, all documentation required for programs must be received by Study Away staff at least 21-days prior to departure.

**Legal Liability of WKU Program Leaders** - WKU's General Counsel defines the WKU employee's rights related to workers' compensation and liability engaged in Study Away activities. As with any legal matter, liability protection is not absolute and an individual may choose to also have additional personal liability insurance policies.

## XV. Resources

**Faculty Support and Program Development** - the Office of Study Away encourages new and experienced leaders to create new programs and to enhance current programs, respectively, through a program development grant found at <http://www.wku.edu/studyaway/leaders/programdevelopmentgrant.php>. The Office of Study Away funds may be requested with an explicit commitment of matching funds.

**WKU Policies and Handbooks:**

- Relevant policies and statements are found here: <http://www.wku.edu/studyaway/leaders/policies.php>

**Course Development Resources & Policies:**

- Guidance on developing syllabi – available from SAO
- Other importance curriculum-related policies are here: <http://www.wku.edu/studyaway/leaders/policies.php>

**WKU Insurance forms:**

- Insurance forms: <https://www.wku.edu/finadmin/insurance/>

## XVI. Wrap Up

We recognize that this administrative guidelines and the Study Away model continues to develop. The goal is to increase and improve Study Away programs and support leaders in all phases of the programs. This guidelines is intended to make the process of creating a Study Away program more accessible and transparent to students, faculty, department heads, and college deans.

As stated under Guiding Principles, Study Away programs are a shared responsibility in which the learning outcomes are positively affected by the destination and the process of preparing and assessing the courses encourages sustainable programs.

As a leader of such these programs, your input is encouraged.

## XVII. CONTACTS

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